South America Vegetable Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

Market Report | 2024-02-17 | 276 pages | Mordor Intelligence

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Report description:

The South America Vegetable Seed Market size is estimated at USD 542.75 million in 2024, and is expected to reach USD 708 million by 2030, growing at a CAGR of 4.53% during the forecast period (2024-2030).

Key Highlights
-Solanaceae is the Largest Crop Family. It is the largest segment due to an increase in domestic demand and rising demand from the processing industries for these solanaceae crops, particularly for tomatoes.
-Brazil is the Largest Country. Brazil dominates the market due to its highest area under vegetable cultivation in the region and the usage of the high percentage of hybrids to achieve higher productivity.
-Cucurbits is the Fastest-growing Crop Family. The fastest growth of the segment is due to an increase in the consumption of salad, short duration crops, suitable for protected cultivation and high export value.
-Brazil is the Fastest-growing Country. Brazil is the leading producer of vegetables in the region with the support of favorable weather conditions and favorable prices which led to an increase in cultivation.

South America Vegetable Seed Market Trends

Hybrids is the largest Breeding Technology

- In 2021, hybrids' share was more than the open-pollinated share in the South American vegetable seed market because the demand for hybrid seeds is high due to benefits such as drought tolerance, adaptability to the soil, and higher yield than

open-pollinated seed varieties.
- The cultivation area of vegetables using hybrid seeds has increased from 0.9 million ha in 2016 to 1.03 million ha in 2028 because of the high-value crops such as tomatoes, garlic, and lettuce. Hybrid seeds help growers produce high-quality vegetables by limiting crop loss due to different diseases.
- In protected cultivation, hybrid seeds share was 100% because OPVs cannot be used in protected cultivation due to limitations such as the required insects or pests to be pollinated naturally, but in protected cultivation, there is no natural pollination.
- Major companies, such as Syngenta, Rijk Zwaan Zaadteelt en Zaadhandel BV, and Enza Zaden, are also focused on providing improved hybrid seed varieties that are tolerant to viral diseases and are resistant to boltings and mildews.
- Open-pollinated seed varieties are used by small-scale farmers because of the low prices of seed and will help save input costs, but the crop damage is high as pests can attack the crop. Therefore, it is a restraint in the growth of open-pollinated seed varieties during the forecast period.
- The hybrid seed segment is expected to increase from 62% in 2016 to 64.7% in 2028 because of the increase in the usage by farmers, companies providing new hybrid seed varieties, and benefits such as resistance to diseases, weather conditions, and pest attacks.
- Therefore, the sales of hybrid seeds are expected to increase during the forecast period due to benefits such as higher yield and high-quality vegetables produced.

Brazil is the largest Country

- In 2021, South America's market share in the global vegetable seed market was about 6.9% because Chile is a leading exporter of seeds, has favorable weather conditions, and high demand for vegetables domestically as well as globally.
- The cultivation area for vegetables has increased from 5.2 million ha in 2018 to 5.3 million ha in 2022 because of the increase in the demand for vegetables and high prices, leading to high profits. Therefore, more seeds are expected to be required for cultivation during the forecast period.
- Hybrid seeds are used more than open-pollinated seed varieties in South America because of the higher yield, resistance to different diseases, and ability to adapt to different weather conditions such as drought or less rainfall than normal. Therefore, the sales of hybrid seeds are expected to increase during the forecast period.
- Brazil had the largest share in South America because it cultivates tomatoes, which have high prices. The use of hybrid seeds of the total vegetable seeds value in South America was about 34.8% in 2021.
- Rest of South America is registering a CAGR of 4.07% from 2022 to 2028 because of favorable weather conditions for different vegetable crops, especially tomato, onion, and potato, and Chile is a leading exporter of seeds.
- The adoption of protected cultivation is increasing; the share of protected cultivation increased from 2.3% in 2016 to 2.8% in 2028 because of technological advancements in the cultivation mechanism.
- Therefore, factors such as an increase in the cultivation area, new technological advancements, and high demand for vegetables, globally, will help in the growth of the vegetable seed market in South America during the forecast period.

South America Vegetable Seed Industry Overview

The South America Vegetable Seed Market is moderately consolidated, with the top five companies occupying 58.27%. The major players in this market are Bayer AG, Bejo Zaden B.V., Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel B.V. and Syngenta Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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